

## **DRAFT MCIRB PROPOSAL REVIEW PROCESS GUIDELINES**

**As discussed in the August 7, 2008 MCIRB Meeting**

1. Subcommittees for technical evaluation will be made up of three members of the MCIRB. The three members will include two members of the public and one City representative.
2. Subcommittee configurations will be specific to the acquisition and may or may not mimic the configurations of prior subcommittees.
3. Subcommittees will establish meeting times and locations, based on membership of the subcommittee.
4. Subcommittees will receive technical evaluation tools (e.g., evaluation scorecards) and an in-briefing on technical evaluation processes and guidelines from P&C. Throughout the technical evaluation process, P&C will be available to provide assistance and guidance on procedural matters and will serve as the sole conduit to proposers (if such contact is required).
5. The Business Office will support the work of the subcommittees by scheduling meeting space, arranging for City and/or outside subject matter experts to attend meetings and/or conduct reviews, and providing other ad hoc administrative support.
6. The initial activity of a subcommittee will be to develop a workplan that includes a timeline and what resources are required to complete the technical review, such as:
  - Knowledge of the function being evaluated (research, opportunity to ‘shadow’ current service providers)
  - Subject matter expertise (including number, role)
  - Evaluation support from another ‘special’ MCIRB subcommittee (e.g., to complete review of one or more discrete sections of the proposals)
7. All subcommittee members and subject matter experts advising the subcommittees will sign a certification that they have no financial interest in the competition as well as a non-disclosure.
8. Subject matter experts should be used in such a way as to maintain the level playing field.
9. Subject matter experts may not comment on their use of vendors or contract relationships (potentially biasing the competition).
10. Subcommittee members will not discuss the work of their subcommittee and/or their evaluations until the work of the subcommittee is complete.
11. Any questions of vendors that the subcommittee members want answered must be routed through Purchasing & Contracting (P&C)—there will be no proposer contact by any outside of P&C.
12. P&C will be the recipient of proposals and will provide proposal volumes to respective audiences (e.g., MCIRB, Auditor) on an as needed basis.

13. Cost information will be provided to the technical evaluation committee only after technical evaluation is complete.
14. The subcommittee may use orals (interviews) to support technical evaluation.
15. Subcommittee members will not disclose the proposal documents received as part of their evaluation.

*Roles of technical advisors/subject matter experts:*

- Non-voting member of the subcommittee, who completes a full technical evaluation
- As-needed (on-call) expertise
- Evaluation of a particular component of the technical proposal (e.g., use of information technology)

*Subject matter experts may be drawn from the following areas:*

- Statement of Work (SoW) team members
- City staff who are on neither the SoW or employee proposal teams
- Public-sector employees from outside (non-City) entities
- Private-sector experts who have no conflict of interest or financial interest in the solicitation
- Community stakeholders

*Outstanding issues:*

- Some aspects of the proposal evaluation (risk/financial analysis, past performance) will need to be evaluated by an outside entity, with the results provided to the technical evaluation team (pass/fail for financial/risk analysis?) in order to protect the ‘levelness’ of the proposals (City information will appear very different than outside vendors’ information—or might be altogether unnecessary)
- Employee proposals will have to be ‘audited’ prior to cost evaluation—which will precede technical evaluation